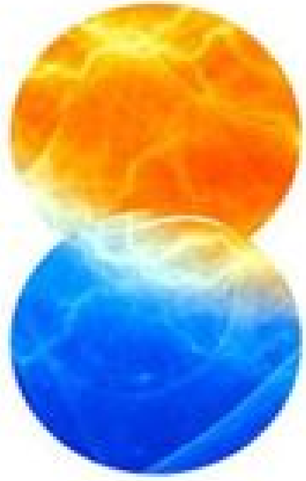
|全彩精装|



TRANSBOUNDARY

跨界

开启互联网与传统行业融合新趋势

腾讯科技频道 / 著

互联网带来的跨界浪潮正以前所未有之势颠覆传统行业

互联网作为一个产业将会消失，因为所有产业都将会互联网化

机械工业出版社
China Machine Press

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[illegible]www.bbbvip.com

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[illegible]20[illegible]BBS[illegible]

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linkedin [illegible] 10 [illegible] 10 [illegible]

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[illegible] IM [illegible]

[illegible] OA [illegible] — [illegible]

[illegible] OA [illegible]

[illegible] YAMMER [illegible] “[illegible] OA” [illegible]

[illegible] 12 [illegible]

[illegible] 10 [illegible] 10 [illegible]

[illegible]

[1] [illegible] Instant Messaging [illegible]

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[illegible]2014[illegible]40%[illegible]2[illegible]

[illegible]30[illegible]1000[illegible]30[illegible]68[illegible]

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图 1-1

[illegible] 1965[illegible]Intel[illegible]·[illegible]

[illegible]18[illegible]

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[illegible]

[illegible] 20[illegible]70[illegible]·[illegible]25[illegible]CPU[illegible]20[illegible]90[illegible]K[illegible]M[illegible]

[illegible]Internet2.0[illegible]P2P[illegible]3D[illegible]

[illegible]·[illegible]“[illegible]”[illegible]

[illegible]BBS[illegible]

[illegible] Gmail[illegible]Gmail[illegible]Gmail[illegible]Gmail[illegible]

[illegible]

[illegible]SNS[illegible]

[illegible]

[illegible]30[illegible]7.29[illegible]“[illegible]”[illegible]

[illegible]·[illegible]25[illegible]

[illegible]

[illegible]2013[illegible]58[illegible]30[illegible]

[illegible]

[illegible]20[illegible]C2C[illegible]Copy to China[illegible]IPO[illegible]“Facebook+Zynga+Groupon+Linkedin”[illegible]

[illegible]C2C[illegible]“[illegible]”[illegible]“[illegible]”[illegible]C2C[illegible]“[illegible]”[illegible]“[illegible]”[illegible]

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[illegible]

Glocalization

C2C[illegible]Glocalization[illegible]Global[illegible]Localization[illegible]“[illegible]”[illegible]

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[illegible]AOL[illegible]American Online[illegible]ISP [1]+ICP [2][illegible]ISP[illegible]ISP+ICP[illegible]ICP[illegible]ISP[illegible]

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Hao123 265

Glocalization

C2C eBay

QQ AOL ICQ QQ ICQ ICQ QQ

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[illegible]C2C

[illegible]“[illegible]”[illegible]“[illegible]”[illegible]“[illegible]”[illegible]

[illegible]“[illegible]”[illegible]“[illegible]”[illegible]

2013[illegible]2014[illegible]2013[illegible]Evernote[illegible]2014[illegible]Linkedin[illegible]Glocalization[illegible]



[illegible]Uber[illegible]C2C+Glocalization[illegible]

[1] Internet Service Provider[illegible]

[2] Internet Content Provider[illegible]

[3] Whats App messenger[illegible]Whats App[illegible]

[4] [illegible]NHN[illegible]NHN Japan[illegible]

[5] [illegible]

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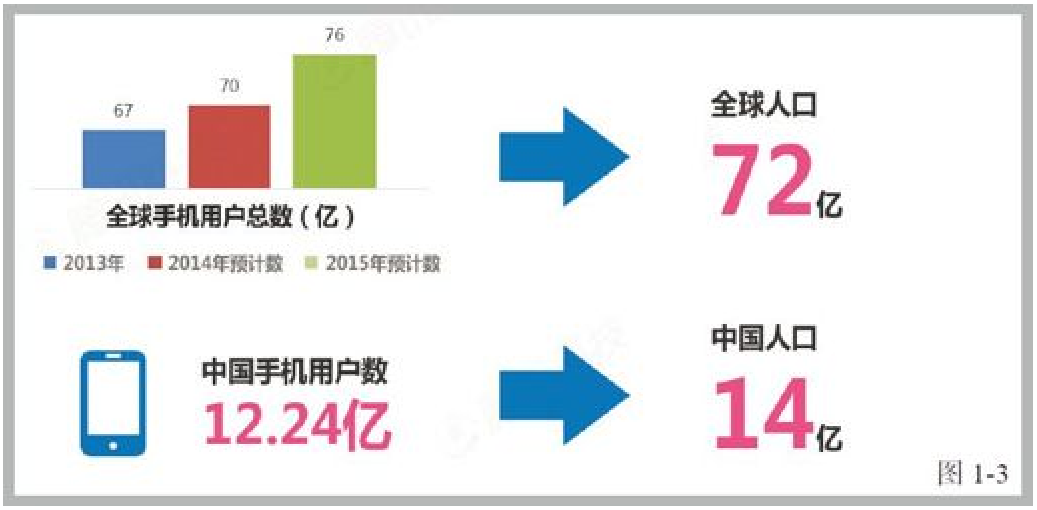
□□□□□□□□□□□□□□1-2□□□2020□□□□□□□□□□□□500□□□□□□□□GSMA□□□□□M2M□□□□□□□□□□□□□

□□□1-3□□

□□□□□□□□□□□□□□□□□□□□□□□□□□“□□□□□”□□□□□□□□—□□□□□□□□□□□□□□□—□□□



图 1-2


76
70
67
全球手机用户总数（亿）
2013年
2014年预计数
2015年预计数
全球人口
72亿
中国手机用户数
12.24亿
中国人口
14亿
图 1-3

[illegible]HTML5[illegible]

HTML5[illegible]App[illegible]HTML5[illegible]

HTML5[illegible]WII[illegible]

PS2[illegible]XBOX[illegible]iOS[illegible]Android[illegible]

[illegible]—[illegible]—[illegible]HTML5[illegible]

[illegible]HTML5[illegible]

[illegible]HTML5[illegible]

[illegible]

[illegible]“[illegible]”[illegible]

[illegible]—[illegible]

[illegible]

[illegible]2G[illegible]

[illegible]WIFI[illegible]WIFI[illegible]

[illegible]WIFI[illegible]

[illegible]3G[illegible]TD-SCDMA[illegible]2G[illegible]

[illegible]3G[illegible]4G

[illegible]WIFI[illegible]

WIFI[illegible]3G/2G[illegible]WIFI[illegible]

[illegible]“[illegible]”[illegible]

[illegible]

[illegible]

[illegible]

[illegible]—[illegible]

[illegible]

[illegible]iOS[illegible]

[illegible]KPCB[illegible]2009[illegible]12[illegible]64%[illegible]

[illegible]30%[illegible]2010[illegible]12[illegible]63%[illegible]

[illegible]35%[illegible]

[illegible]

[illegible]2003[illegible]11[illegible]

[illegible]10[illegible]

[illegible]

[illegible]ARM[illegible]Intel[illegible]

[illegible]CPU[illegible]

[illegible]

[illegible]

[illegible]2010[illegible]eBay[illegible]·

[illegible]eBay[illegible]20[illegible]2011[illegible]40[illegible]

[illegible]LBS[illegible]

[illegible]2010[illegible]7[illegible]7[illegible]2011[illegible]7[illegible]1.5[illegible]2.5[illegible]3.5[illegible]9[illegible]10[illegible]12[illegible]

[illegible]

[illegible]

[illegible]

[illegible]PC[illegible]—[illegible]1-4[illegible]

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全球移动流量增长趋势图（EB/月）
20
15
10
5
0
数据：移动电脑、平板电脑等
数据：手机
语音
2010
2011
2012
2013
2014
2015
2016
2017
2018
2019
10倍
2013 ~ 2019年，移动数据流量的增长率
手机产生的流量超过了笔记本电脑、平板电脑等所产生的流量
数据来源：爱立信报告
图 1-4

[illegible]

[illegible]

[illegible]

[illegible]10[illegible]

[illegible]

2012[illegible]8[illegible]“[illegible]”[illegible]“[illegible]”

[illegible]



[illegible]10[illegible]19[illegible]

[illegible]“Google Glass”[illegible]“[illegible]”[illegible]—[illegible]“[illegible]”[illegible]

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图 1-5

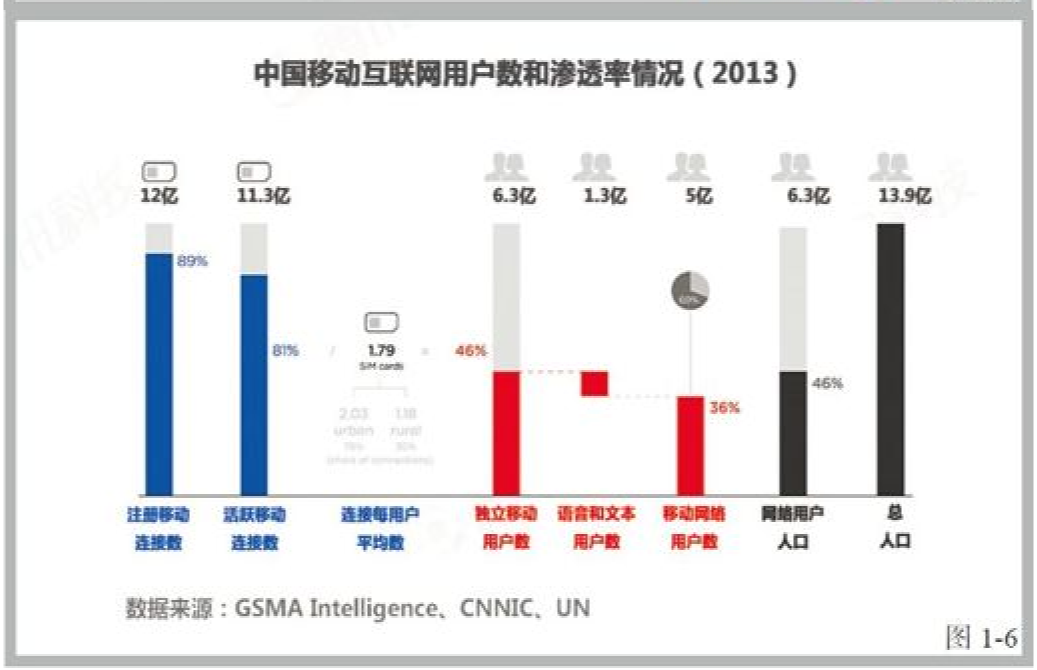


图 1-6

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[illegible]70%[illegible]80%[illegible]

[illegible]“[illegible]”[illegible]

[1] “ [illegible]”[illegible]

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1994[illegible]SFNB[illegible]1995[illegible]10[illegible]1998[illegible]1999[illegible]1998[illegible]10[illegible]1860[illegible]2000[illegible]

[illegible]“[illegible]”[illegible]Offline[illegible]Online[illegible]Offline[illegible]O2O[illegible]Online 2 Onffline[illegible]Offline 2 Online[illegible]

2013[illegible]Offline[illegible] [1][illegible]“[illegible]”[illegible]

[illegible]10[illegible]

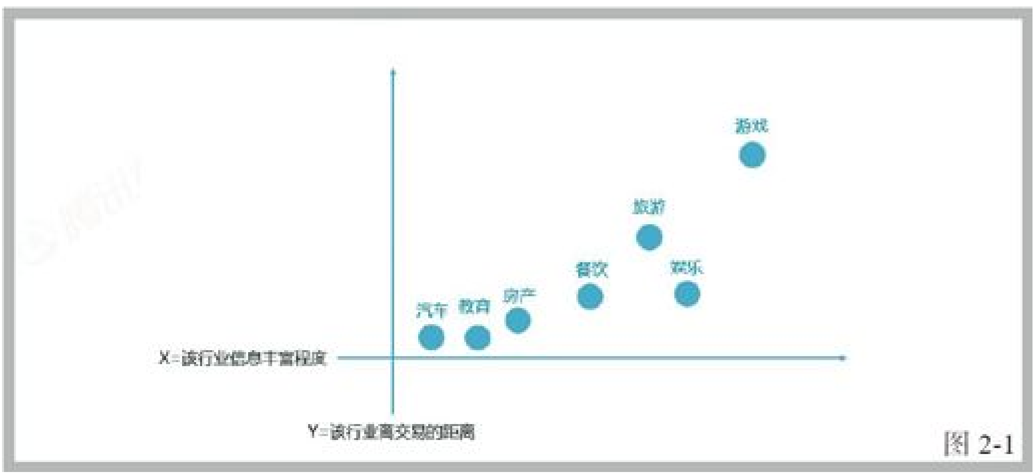


图 2-1

[illegible]

[illegible]10[illegible]

[1] [illegible]

[2] [illegible]Baidu[illegible]Alibaba[illegible]Tencent[illegible]

[3] [illegible]360[illegible]

[illegible] O2O[illegible]

2010[illegible]21[illegible]10[illegible]10[illegible]

[illegible]

[illegible]“[illegible]”[illegible]“[illegible]”[illegible]“[illegible]”[illegible]2011[illegible]

[illegible]Groupon [1][illegible]2011[illegible]

[illegible]IPO[illegible]IPO[illegible]

[illegible]Groupon[illegible]

[illegible]O2O[illegible]

[illegible]

[illegible]



[illegible]“[illegible]”[illegible]“[illegible]”[illegible]

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[illegible]2014[illegible]

[illegible]

[illegible]2004[illegible]2008[illegible]

[illegible]10[illegible]O2O[illegible]O2O[illegible]“[illegible]”[illegible]

[illegible]O2O[illegible]

[illegible]O2O[illegible]

[illegible]O2O[illegible]O2O[illegible]2014[illegible]O2O[illegible]



10 20

CPS Cost Per Sales

CPS



图 2-2

[illegible]O2O[illegible]2-2[illegible]

[illegible]11[illegible]

[illegible]



图 2-3



图 2-4

[illegible]O2O[illegible]2-3[illegible]O2O[illegible]2-4[illegible]

[1] [illegible]“Group+Coupon”[illegible]

[illegible]

[illegible] PR[1] [illegible] “[illegible]” [illegible]

[illegible]

[illegible] Deloitte [illegible] 2013 [illegible] 2.3 [illegible] 2013 [illegible] 2014 [illegible] 30 [illegible]

[illegible] 2012 [illegible] 40 [illegible]

[illegible] IT [illegible] IT [illegible]

[illegible]

“[illegible]2010[illegible]2020[illegible]MOOC[illegible]‘985[illegible]’[illegible]

“[illegible]‘[illegible]’—[illegible]‘[illegible]’[illegible]‘[illegible]’[illegible]”

[illegible]—[illegible]K12[illegible]K12[illegible]2.1[illegible]

[illegible]2014[illegible]2000[illegible]K12[illegible]K12[illegible]

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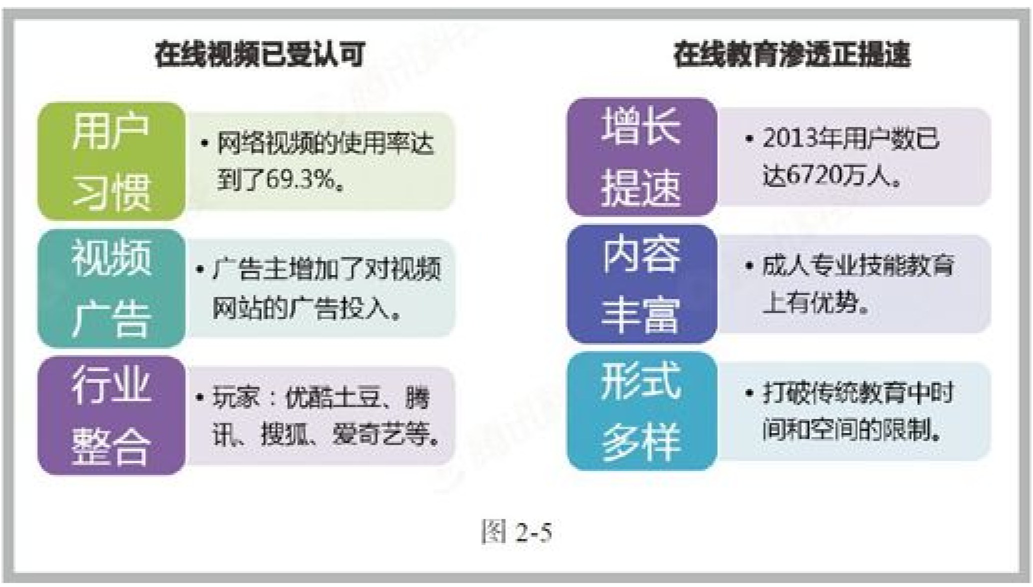

在线视频已受认可
用户习惯
• 网络视频的使用率达到了69.3%。
视频广告
• 广告主增加了对视频网站的广告投入。
行业整合
• 玩家：优酷土豆、腾讯、搜狐、爱奇艺等。
在线教育渗透正提速
增长提速
• 2013年用户数已达6720万人。
内容丰富
• 成人专业技能教育上有优势。
形式多样
• 打破传统教育中时间和空间的限制。

图 2-5



图 2-6

□□□□3□18□□□□□□□□□□□□□□□□□□2013□□□□□□□□□□□□□□□

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□□□□□□□□□2009□□□□□□□□□□□□□□□□□2014□7□□□□□□□□□□□

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□□□□□□□□□□2014□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□

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图 2-7



图 2-8

[illegible]2-7[illegible]2-8[illegible]2-9[illegible]2-10[illegible]2-11[illegible]



图 2-9



图 2-10

2014[illegible]2[illegible]YY[illegible]“100[illegible]”[illegible]10[illegible]—[illegible]2[illegible]



图 2-11

“100[illegible]”[illegible]“100[illegible]”[illegible]100%[illegible]

[illegible]2015[illegible]1200[illegible]BAT[illegible]

[illegible]

[illegible]“[illegible]”[illegible]“[illegible]”[illegible]PC[illegible]

[1] [illegible]Page Rank[illegible]

[illegible]　[illegible]

[illegible]

2012[illegible]12[illegible]“CCTV[illegible]”[illegible]“10[illegible]50%[illegible]”[illegible]

2013[illegible]“[illegible]”[illegible]“[illegible]”[illegible]“[illegible]”[illegible]12306[illegible]

[illegible]“[illegible]”—[illegible]—[illegible]“[illegible]”[illegible]

[illegible]/[illegible]/[illegible]

[illegible]“[illegible]”[illegible]

[illegible]—[illegible]
[illegible]1000[illegible]18[illegible]50[illegible]23%[illegible]
[illegible]50%[illegible]

[illegible]

[illegible]

[illegible]“[illegible]”[illegible]

[illegible]100[illegible]

2013[illegible]O2O[illegible]“[illegible]

[illegible]70%[illegible]80%[illegible]”[illegible]“[illegible]”[illegible]

[illegible]IT[illegible]——[illegible]“[illegible]”[illegible]

[illegible]“[illegible]”[illegible]Warby Parke[illegible]C&A[illegible]Facebook[illegible]“Like”[illegible]

[illegible]“[illegible]”[illegible]



[illegible]“3+1”[illegible]“3”[illegible]“[illegible]”[illegible]P2P [1][illegible]“1”[illegible]

“[illegible]”[illegible]2013[illegible]2-12[illegible]


互联网金融释放资金能量
成本优势
• 网上银行只有实体网点成本的1/10
数据分析
• 技术上解决市场信息不对称难题
化零为整
• 用平台解决分散的金融需求

图 2-12

[illegible]

QQ[illegible]10[illegible]

[illegible]

[illegible]P2P[illegible]

P2P[illegible]P2P[illegible]“[illegible]”[illegible]P2P[illegible]P2P[illegible]P2P[illegible]“[illegible]”[illegible]P2P[illegible]

[illegible]P2P[illegible]

P2P[illegible]P2P[illegible]P2P[illegible]2014[illegible]7[illegible]P2P[illegible]2-1[illegible]

[illegible]2-1

排名	上月	变化	网贷名	五星评级	总分	[illegible]	月成交量（万）	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
1	1	-	人人贷	★★★★★	76	12.85% / 2	20400 / 10	10	30 / 10	4	18100 / 10	3300 / 10	5 / 10	4	15% / 5
2	3	↑1	有利网	★★★★★	76	12.12% / 1	41000 / 10	9	16 / 10	2	22875 / 10	5563 / 10	7 / 10	4	29% / 10
3	4	↑1	红岭创投	★★★★★	71	14.60% / 4	58100 / 10	9	4.2 / 4	5	14860 / 10	1330 / 8	42 / 6	5	20% / 10
4	2	↓2	微贷	★★★★★	70	18.30% / 4	11200 / 10	8	1.8 / 2	8	8500 / 8	4100 / 10	8 / 10	4	11% / 8
5	6	↑1	365易贷	★★★★★	70	18.30% / 6	11820 / 10	6	6.2 / 5	7	5000 / 8	396 / 8	10 / 9	7	2% / 5
6	新	-	[illegible]	★★★★☆	68	20.00% / 8	14100 / 10	5	9.2 / 9	5	4060 / 6	2480 / 10	6 / 10	3	0% / 2
7	5	↓2	[illegible]	★★★★☆	63	18.60% / 6	11800 / 10	7	5.1 / 5	6	4100 / 8	129 / 4	80 / 4	8	2% / 5
8	12	↑4	[illegible]	★★★★☆	62	20.00% / 8	4017 / 6	4	8 / 3	5	1563 / 3	249 / 6	16 / 8	4	28% / 10
9	10	↑1	人人聚财	★★★★☆	60	11.60% / 1	14600 / 10	4	5 / 5	3	7000 / 8	1350 / 8	11 / 8	3	45% / 10
10	7	↓3	[illegible]	★★★★☆	59	11.50% / 1	7100 / 8	5	30 / 10	2	6700 / 8	1020 / 8	7 / 10	2	4% / 5
11	23	↑12	融金所	★★★★	59	20.50% / 10	6900 / 8	5	5.1 / 5	6	1223 / 3	307 / 6	22 / 8	1	35% / 10
12	8	↓4	拍拍贷	★★★★	57	10.00% / 0	7800 / 8	8	4.2 / 4	2	14100 / 10	10500 / 10	1 / 10	0	6% / 5
13	9	↓4	投哪网	★★★★	56	11.80% / 1	18500 / 10	5	1.2 / 1	5	3700 / 6	1450 / 8	13 / 8	4	17% / 8
14	11	↓3	808信贷	★★★★	56	18.80% / 6	14700 / 10	6	3.2 / 3	6	4060 / 6	390 / 6	38 / 6	8	-3% / 2
15	16	↑1	[illegible]	★★★★	55	20.40% / 8	21230 / 10	5	2.36 / 2	4	2720 / 4	159 / 6	134 / 2	6	16% / 8
16	13	↓3	爱投资	★★★☆	54	13.50% / 2	33700 / 10	6	10 / 10	4	14712 / 10	39 / 3	864 / 0	4	10% / 5
17	15	↓2	陆金所	★★★☆	54	8.61% / 0	大量 / 10	10	24 / 10	2	无 / 5	无 / 5	无 / 5	2	无 / 5
18	14	↓4	[illegible]	★★★☆	51	21.68% / 10	1803 / 4	3	5.32 / 3	6	1115 / 3	104 / 4	15 / 8	6	11% / 8
19	18	↓1	广信贷	★★★☆	50	20.00% / 8	6271 / 8	3	1.23 / 1	6	1049 / 4	113 / 4	10 / 6	6	13% / 6
20	19	↓1	开鑫贷	★★★☆	50	9.00% / 0	大量 / 10	8	8 / 8	3	无 / 5	无 / 5	无 / 5	3	无 / 5
21	20	↓1	[illegible]	★★★	50	28.50% / 10	3317 / 6	3	1.8 / 1	5	477 / 2	87 / 3	38 / 6	4	29% / 10
22	22	-	和信贷	★★★	47	19.00% / 6	15000 / 10	5	1.9 / 2	4	3800 / 6	118 / 4	127 / 2	5	7% / 5
23	25	↑2	[illegible]	★★★	47	21.96% / 10	1771 / 4	3	4 / 4	4	1685 / 4	114 / 4	16 / 8	4	-2% / 2
24	17	↓7	团贷	★★★	46	15.00% / 4	17000 / 10	7	5 / 5	5	3400 / 6	80 / 3	213 / 0	4	-3% / 2
25	31	↓6	热贷	★★★	46	20.60% / 10	1965 / 4	3	2.1 / 2	5	650 / 2	30 / 2	98 / 4	4	28% / 10
26	26	-	融资城	★★★	43	20.00% / 8	大量 / 10	4	4 / 4	4	无 / 2	无 / 2	无 / 0	4	无 / 5
27	21	↓2	[illegible]	★★★	43	13.00% / 2	8800 / 8	4	1.4 / 1	6	1750 / 4	182 / 6	52 / 8	6	-1% / 2
28	24	↓4	[illegible]	★★★	41	18.30% / 4	5050 / 6	3	2.3 / 2	5	1790 / 4	30 / 2	165 / 2	5	17% / 8
29	29	-	[illegible]	★★★	38	18.30% / 6	4300 / 6	3	1.6 / 1	5	930 / 3	80 / 3	72 / 4	4	0% / 5
30	30	-	[illegible]	★★★	35	17.00% / 4	4050 / 6	4	4.2 / 4	6	482 / 2	23 / 2	175 / 2	4	-9% / 2
31	28	↓3	安心贷	★★☆	33	14.00% / 2	9200 / 8	3	4.1 / 4	3	1150 / 3	63 / 3	146 / 2	3	-4% / 2
32	33	↑1	开心贷	★★☆	31	14.00% / 2	2030 / 4	3	2.1 / 2	3	610 / 2	25 / 2	19 / 4	4	3% / 3
33	34	↑1	[illegible]	★★☆	25	12.50% / 1	较少 / 0	3	30 / 10	0	无 / 2	无 / 2	无 / 2	0	无 / 0
34	32	↓2	[illegible]	★★☆	22	12.50% / 1	2200 / 4	3	3.5 / 3	3	290 / 2	18 / 2	122 / 2	0	-6% / 2

★[illegible]★

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http□//blog.sina.com.cn/s/blog_d430de9e0101stoq.html□

P2P□□□

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[illegible]

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[illegible]2-13[illegible]2-14[illegible]P2P[illegible]2-15[illegible]



图 2-13



图 2-14

[illegible]2-16[illegible]



图 2-15



图 2-16

[illegible]“[illegible]”[illegible]

[1] Peer to Peer[illegible]



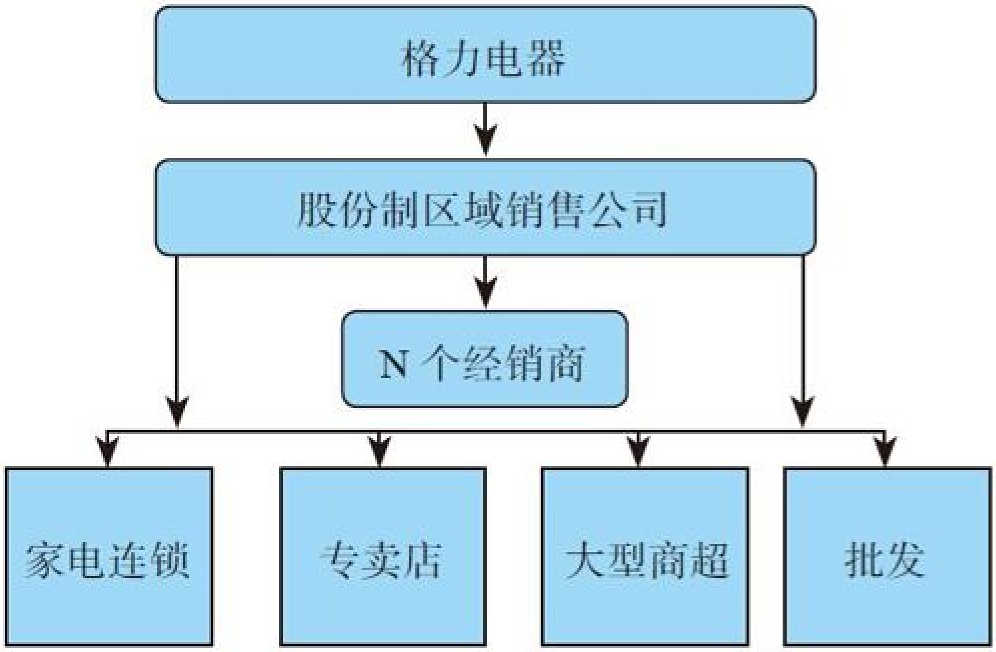


图 2-17



图 2-18

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[illegible]2-19

[illegible]

[illegible]

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[illegible]

[illegible]—[illegible]

[illegible]—[illegible]—[illegible]

[illegible]→[illegible]→[illegible]

[illegible]CEO[illegible]“[illegible]”[illegible]

[illegible]“[illegible]”[illegible]

[illegible]10[illegible]20[illegible]

[illegible]—[illegible]—[illegible]

[illegible]2B[illegible]2B[illegible]2B[illegible]2B[illegible]2B[illegible]

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图 2-20

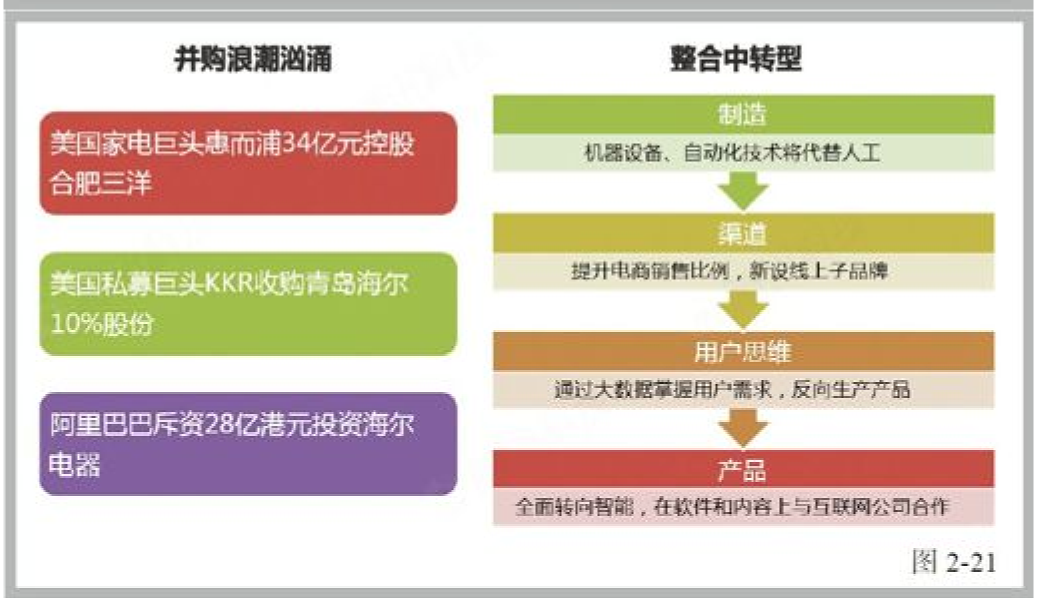


图 2-21

2013□5□□□□□□25□□□□□□□□□□□·□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□10□□□□□□□□□□□□□□□3D□□□□□□□□□□“□□”□□□

[illegible]27[illegible]“[illegible]”[illegible][1][illegible]

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[illegible]“[illegible]”[illegible]“[illegible]”[illegible]3D[illegible]—[illegible]“[illegible]”[illegible]“[illegible]”[illegible]“[illegible]”[illegible]3D[illegible]3D[illegible]

3D[illegible]“[illegible]”[illegible]3D[illegible]

[illegible]3D[illegible]

[illegible]3D[illegible]3D[illegible]3D[illegible]3D[illegible]

[illegible]DIY [2][illegible]3D[illegible]

[illegible]3D[illegible]20[illegible]90[illegible]Makerbot[illegible]Formalabs[illegible]3D[illegible]ENIAC [3][illegible]3D[illegible]3D[illegible]

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[1] [illegible]

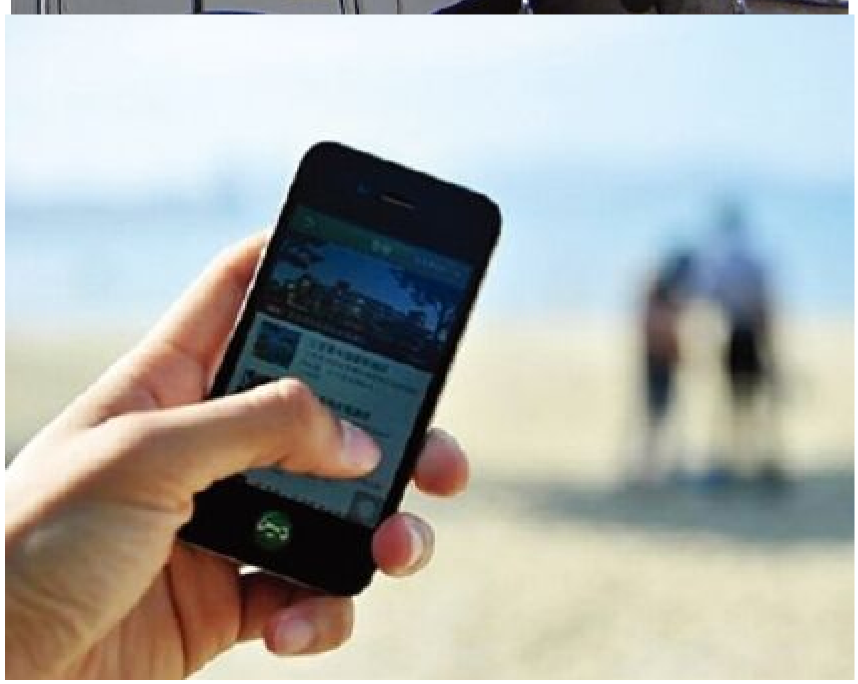
[2] Do It Yourself[illegible]

[3] [illegible]

[illegible]

[illegible]2-22[illegible]2-23[illegible]





[illegible]10%[illegible]10%[illegible]10%[illegible]2013[illegible]40000[illegible]2204.6[illegible]2014[illegible]10%[illegible]2015[illegible]4500[illegible]



图 2-22

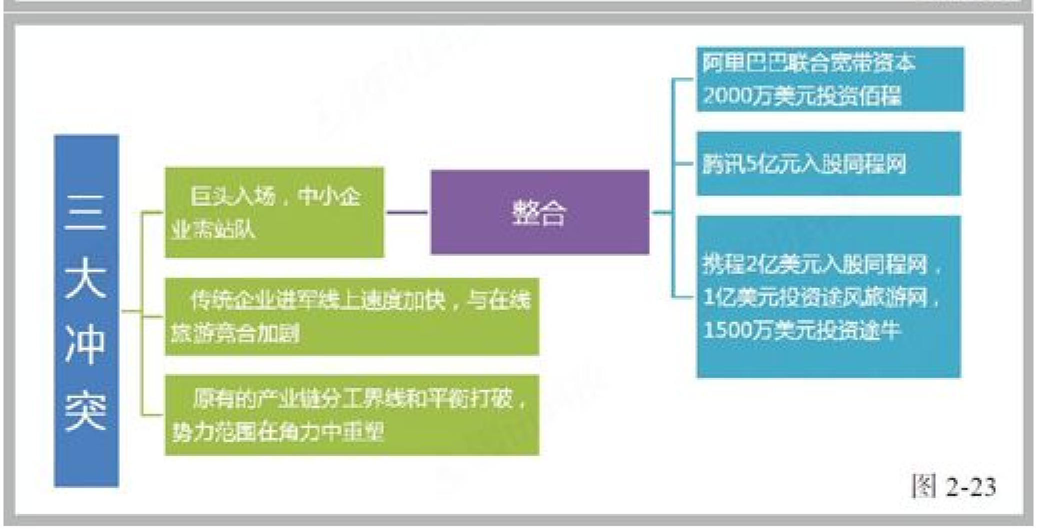
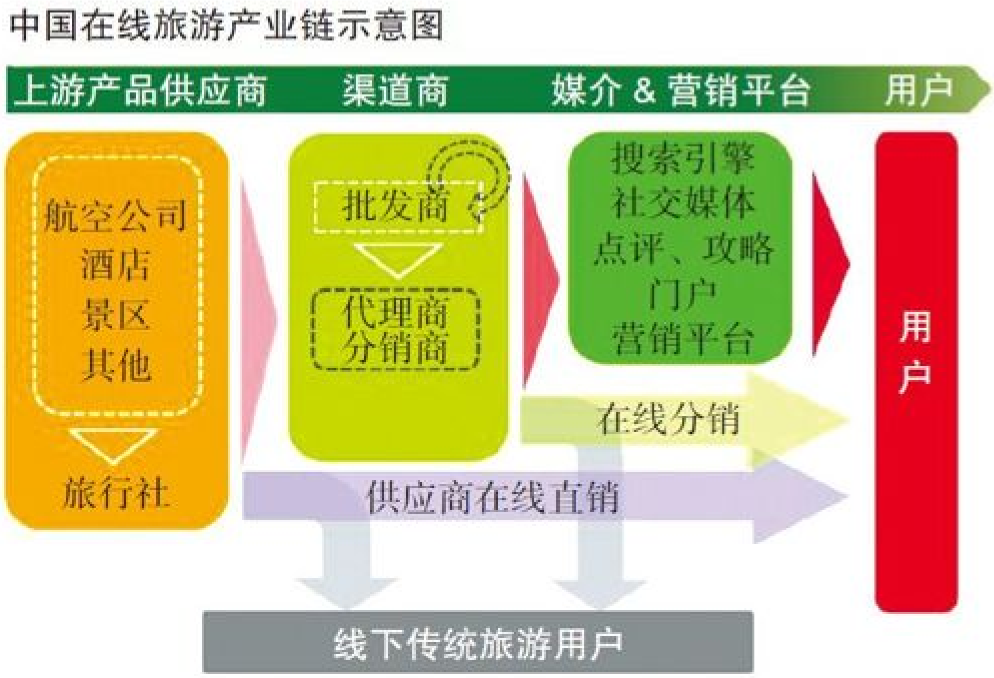


图 2-23

[illegible]2011[illegible]2014[illegible]39[illegible]OTA [1][illegible]iResearch[illegible]2-24[illegible]



□2-24

[illegible]

[illegible]2-24[illegible]2-25[illegible]



□2-25

[illegible]

[illegible]OTA[illegible]

[illegible]

2002[illegible]11[illegible]“[illegible]”[illegible]“[illegible]”

[illegible]2000[illegible]3[illegible]5048.62[illegible]2002[illegible]8[illegible]70%[illegible]“[illegible]”[illegible]

[illegible]—[illegible]

[illegible]—[illegible]

[illegible]10[illegible]—[illegible]

[illegible]“[illegible]”[illegible]

[illegible]2002[illegible]6000[illegible]“[illegible]”[illegible]“[illegible]”[illegible]“[illegible]+[illegible]”[illegible]

[illegible]2011[illegible]40%[illegible]2012[illegible]34%[illegible]

2013[illegible]500[illegible]—[illegible]“[illegible]”[illegible]

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[illegible]41%[illegible]App[illegible]App[illegible]2013[illegible]5[illegible]

[illegible]“[illegible]”[illegible]

iResearch[illegible]50%[illegible]2014[illegible]5[illegible]iResearch[illegible]35.6%[illegible]

[illegible]30%[illegible]

[1] [illegible]Over the Air Technology[illegible]SIM [illegible]

[illegible]

[illegible]2-26[illegible]





[illegible]



图 2-26

[illegible]—[illegible]iOS [1][illegible]U[illegible]/[illegible]

[illegible]“[illegible]”[illegible]1[illegible]2[illegible]Android[illegible]App[illegible]

[illegible]300[illegible]

[illegible]300[illegible]600[illegible]

[illegible]

[illegible]

[illegible]Apple TV[illegible]

Chromecast[illegible]“[illegible]”—[illegible]“[illegible]”[illegible]“Air Play”[illegible]iPad[illegible]Sony[illegible]Intel[illegible]Microsoft[illegible]DLNA

[illegible]Digital Living Network Alliance[illegible]—[illegible]

[illegible]Chrome[illegible]Chromecast[illegible]Chrome[illegible]

Chrome[illegible]YouTube[illegible]Netflix[illegible]Cast[illegible]35[illegible]24[illegible]NetFlix[illegible]Android[illegible]Androidcast[illegible]

[illegible]70%[illegible]30%[illegible]40[illegible]

[illegible]70%[illegible]

[illegible]Video Game[illegible]Wii[illegible]Xbox[illegible]PS[illegible]Xbox360[illegible]2013[illegible]249[illegible]Android[illegible]Apple TV[illegible]Android[illegible]iOS[illegible]—[illegible]

[illegible]

[illegible]HDMI[illegible]HDMI[illegible]

[illegible]

[illegible]DVD[illegible]Xbox360[illegible]Kinect[illegible]

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[illegible]“[illegible]”[illegible]WIFI[illegible]N[illegible]
[illegible]N[illegible]App[illegible]



图 2-27

[illegible]2014[illegible]“[illegible]”[illegible]“[illegible]”[illegible]“[illegible]”[illegible]“[illegible]”[illegible]

[illegible]2-27[illegible]2-28[illegible]

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图 2-28

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□□□□□□□□□□□□□□□□□□2013□□□□□□□□□□5□□□□□□□10□□□□□□□□□□160□□□□□□□□□□1.23□□□□□□220□□□□—□□□□□□□□2013□□□□□□□□□□

BAT□□

□□□□□□□□□□□□□□□□□□2014□3□□□□□□□62.44□□□□□□□□60%□□□7300□□□□□□□□3□□□□6□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□

2014□2□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□3D□□□□□□4000□□□□□□□□□□□□□□□□□□□□2014□7□□□□□□

[illegible]

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[illegible]QQ[illegible]Q[illegible]

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□□□20%□30%□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□Gasson□□

[illegible]10[illegible]
[illegible]

[illegible]

[illegible]

[illegible]

[illegible]—[illegible]

[illegible]

[illegible]“[illegible]”[illegible]DVD[illegible]DVD[illegible]

[illegible]TV[illegible]

2013 3.78 2.4

4.03 2014

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“ ”

“ ”

360

[illegible]

[illegible]2014[illegible]6[illegible]19[illegible]“[illegible]”[illegible]

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[illegible]

[1] [illegible]

[2] [illegible]

[3] [illegible]

[4] [illegible]

[5] [illegible]

[6] [illegible]


170

[illegible]

[illegible]IDC[illegible]ISP[illegible]IDC[illegible]ISP[illegible]

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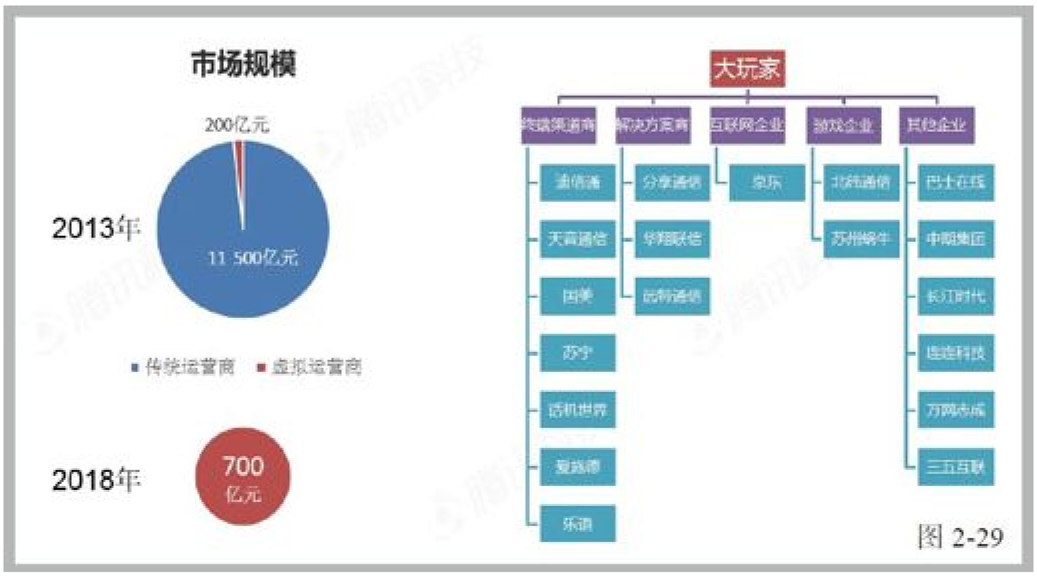

市场规模
200亿元
2013年
11 500亿元
传统运营商
虚拟运营商
2018年
700
亿元
大玩家
终端渠道商
解决方案商
互联网企业
游戏企业
其他企业
迪信通
天音通信
国美
苏宁
话机世界
爱施德
乐语
分享通信
华翔联信
远特通信
京东
北纬通信
苏州蜗牛
巴士在线
中期集团
长江时代
连连科技
万网志成
三五互联

图 2-29


中国
高
信息高速公路
还有多
远
瀛海威时空


差异化
定制化
增值服务
月最低消费
天音通信、话机世界、京东通信主打低价，而蜗牛移动和分享通信的入门门槛均为百元
京东
卡号与电商挂钩，结合购物优惠，每在京东消费购物两元，即可获赠一分钟通话时间等
乐语
在出售170号段时搭售健康设备。这些设备以单独购买、购机送话费或者存费送机形式获得

图 2-30

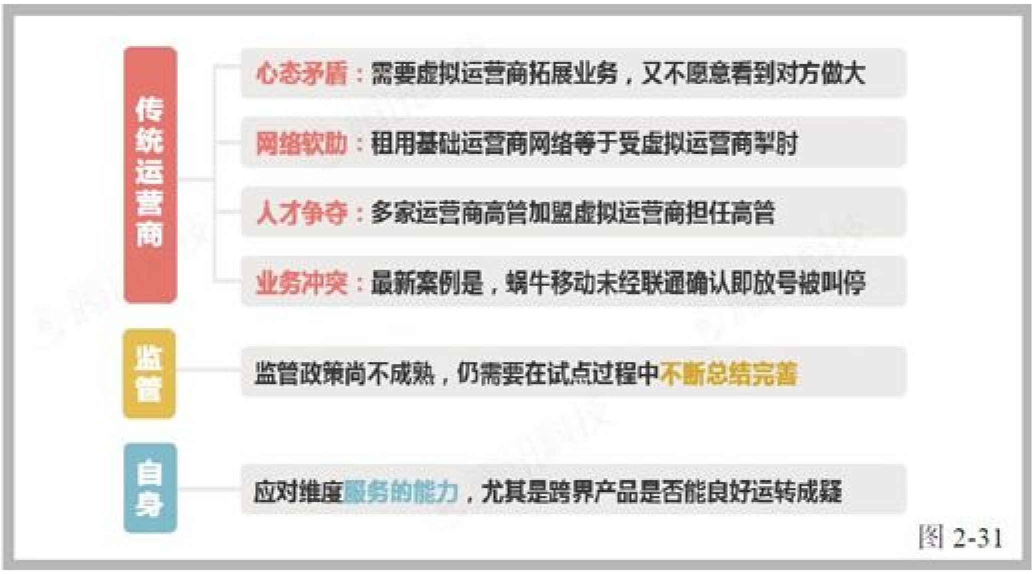


图 2-31

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[illegible]2-31[illegible]

[illegible]110[illegible]120[illegible]/G[illegible]0.1[illegible]/[illegible]

2008[illegible]5[illegible]“[illegible]”[illegible]2009[illegible]1[illegible]3G[illegible]3G[illegible]9000[illegible]4G[illegible]20[illegible]4G[illegible]

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[illegible]Facebook[illegible]

[illegible]Oculus VR[illegible]20[illegible]

Oculus VR[illegible]Oculus Rift[illegible]360[illegible]

3D[illegible]Oculus Rift[illegible]PC[illegible]Android[illegible]



Facebook[illegible]

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[illegible]“one more thing”[illegible]79[illegible]

[illegible]

[illegible]

[illegible]2-32[illegible]



图 2-32

[illegible]“[illegible]”[illegible]

[illegible]“[illegible]”[illegible]

[illegible]“[illegible]”[illegible]Google Glass[illegible]Google Glass[illegible]

[illegible]

[illegible]Facebook[illegible]360[illegible]“[illegible]+[illegible]

+App□□”□□□□□2-33□□□



图 2-33

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[illegible]32[illegible]·[illegible]“2045 initiative”[illegible]2045[illegible]“Global Future Congress”[illegible]GFC[illegible]Facebook[illegible]

“[illegible]iPhone[illegible] [1][illegible]”

[illegible]idea[illegible]GFC[illegible]2015[illegible]Cylons[illegible]2025[illegible]—[illegible]2035[illegible]2045[illegible]

[illegible]“[illegible]”[illegible]86%[illegible]19[illegible]

[illegible]“[illegible]”[illegible]“[illegible]”[illegible]2012[illegible]

[illegible]“[illegible]”[illegible]“1+1=2”[illegible]2045[illegible]30[illegible]

[illegible]“[illegible]”[illegible]3D[illegible]“[illegible]”[illegible]—[illegible]10[illegible]—[illegible]“[illegible]”[illegible]

[illegible]2-34[illegible]



图 2-34

[1] □□□Segway□□□□□□□□□□□□□□□□□□□□□□□□□□

[illegible]

2010[illegible]11[illegible]2000[illegible]10[illegible]2013[illegible]12[illegible]

2014[illegible]3.42[illegible]5500[illegible]3.53[illegible]5690[illegible]1.22[illegible]3690[illegible]

[illegible]2.26[illegible]3.09[illegible]+[illegible]2-35[illegible]



图 2-35

[illegible]4S[illegible]—[illegible]

[illegible]“[illegible]”[illegible]




汽车之家
AUTOHOME INC.
ATHM
LISTED
NYSE



向经销商汇集销售线索
汽车之家30%的收入来自经销商会员收入，可看作是对交易环节的探索
易车采用营销平台的思路，汇集来自全网的销售线索
线上付定金
线下4S店试驾
直付尾款

图 2-36



图 2-37

[illegible]Android Auto[illegible]iOS[illegible]Carplay[illegible]

[illegible]

2013[illegible]Tesla[illegible]



[illegible]Tesla[illegible]“[illegible]

[illegible]”[illegible]—[illegible]Tesla[illegible]“[illegible]”[illegible]

Tesla[illegible]Tesla[illegible]Tesla[illegible]Tesla[illegible]

[illegible]“[illegible]”[illegible]“[illegible]iPhone[illegible]”[illegible]2-38[illegible]

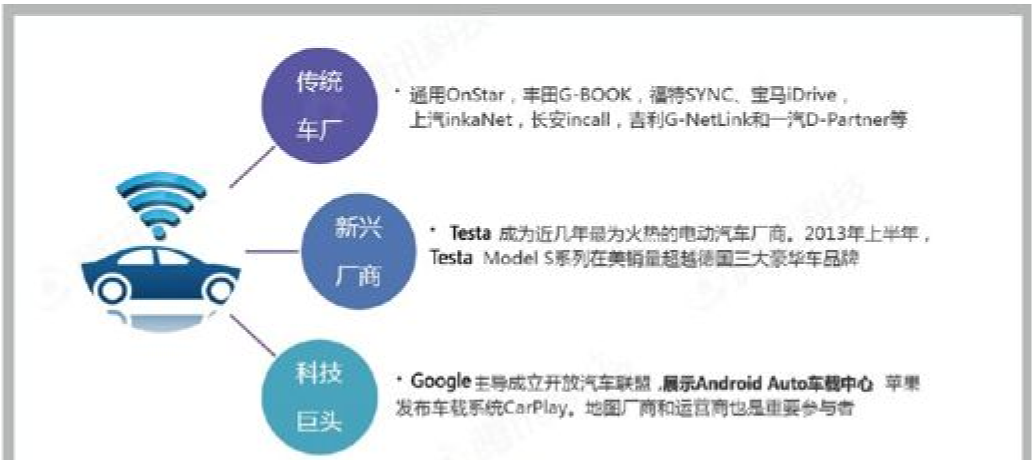


图 2-38

[illegible]iPhone[illegible]007[illegible]

[illegible]Tesla[illegible]Tesla[illegible]

[illegible]IBM[illegible]

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[illegible]OnStar[illegible]18[illegible]OnStar[illegible]OnStar[illegible]OnStar[illegible]OnStar[illegible]iPhone[illegible]“[illegible]”[illegible]OnStar[illegible]OnStar[illegible]“[illegible]”[illegible]

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[illegible]Tesla[illegible]

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[illegible]Mission Impossible 4[illegible]3D[illegible]—[illegible]“[illegible]”[illegible]3D[illegible]“[illegible]”[illegible]3D[illegible]

[illegible]2-39[illegible]



图 2-39

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[illegible]SAP[1][illegible]500[illegible]

[illegible]“[illegible]”[illegible]

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图 3-1

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2014□4□□□□□□□□Digitimes Research□□□□□□□□□□□□□□□□□□□5856□□□□□4.6%□□□□□□□□□□30%□□□

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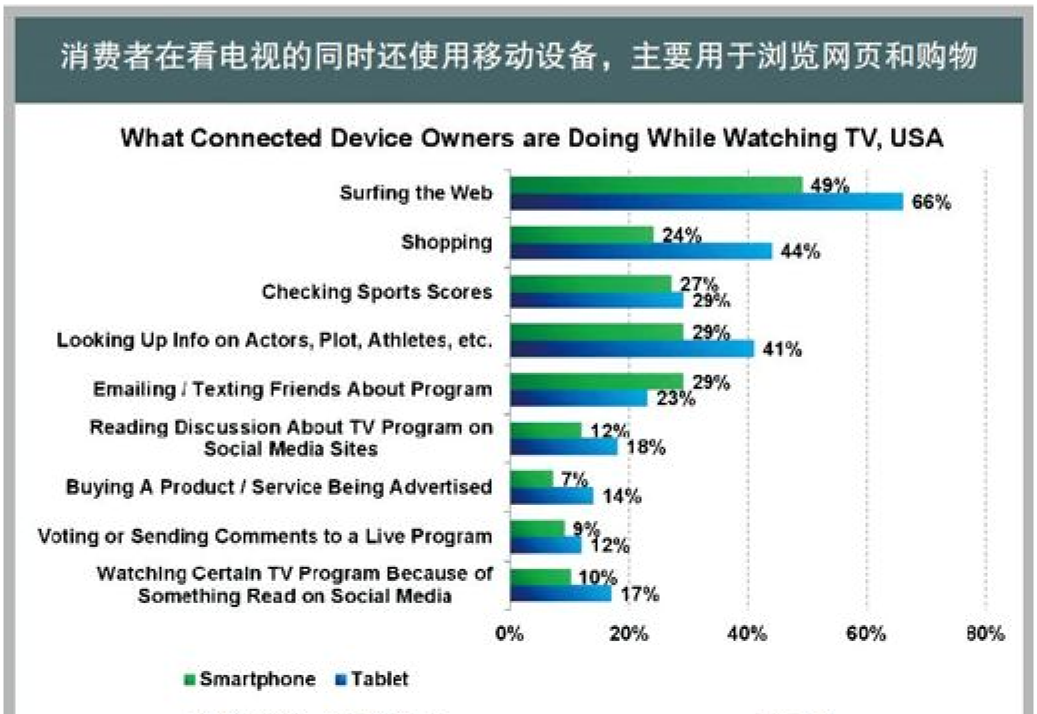
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资料来源：凯鹏华盈。 图 3-2

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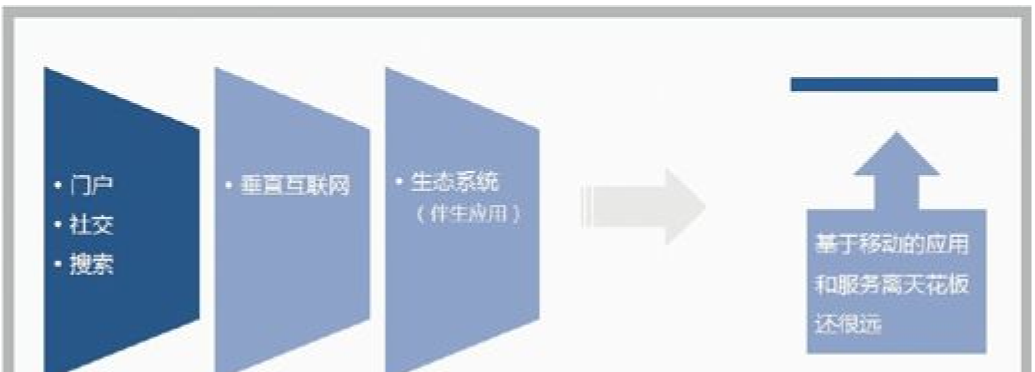


图 3-3

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Winamp□□□
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[illegible]Winamp[illegible]

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[2] [illegible]

[3] [illegible]


终端角度的入口
手机
PC
可穿戴设备
平板电脑
智能家居
智能汽车
服务角度的入口
移动App
浏览器
O2O
WiFi平台
家居底层平台
人工智能

图 3-4

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[illegible]“[illegible]”[illegible]“[illegible]”[illegible]—[illegible]800 [1]-[illegible]10000[illegible]

[illegible]P2P[illegible]“[illegible]”[illegible]“[illegible]”[illegible]P2P[illegible]800[illegible]P2P[illegible]

P2P[illegible]“[illegible]”[illegible]P2P[illegible]“[illegible]”[illegible]P2P[illegible]“[illegible]”[illegible]P2P[illegible]P2P[illegible]

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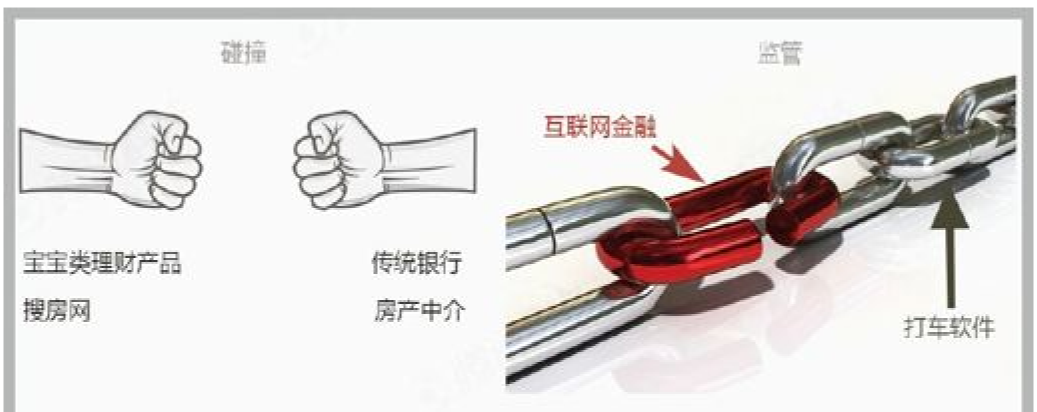


图 3-5



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[illegible]

[illegible]

[1] [illegible]


新浪微博、高德
海尔、优酷土豆
穷游、UC、银泰
恒大足球、友盟
快的打车
文化中国传播
酷盘
......
投资收购超过12家
斥资超过50亿美元
覆盖物流、文化传媒、
O2O、浏览器、金融平台等领域
阿里巴巴
搜狗、金山网络
大众点评、京东
滴滴打车、58同城
四维图新 Snapchat
DST KaKao ibibo
VinaGame
......
Tencent 腾讯
投资收购超过10家
斥资至少30亿美元
覆盖搜索、O2O、电商、
LBS和社交等领域
91无线
PPS
糯米网
......
Baidu 百度
投资收购至少5家
斥资超过24亿美元
覆盖应用分发、O2O、LBS
等领域

图 3-6

[illegible]BAT[illegible]

[illegible]BAT[illegible]

[illegible]“[illegible]”[illegible]“[illegible]”

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[illegible]/[illegible]2014[illegible]

[illegible]—[illegible]


随着互联网对传统产业的渗透，以及巨头之间碰撞
加剧了边界的扩大，无不孕育着诸多新的创业机会
毛利率正在降低
非互联网团队强项
渗透周期比较长
巨头尚不愿介入

图 3-7

[illegible]

[illegible]“[illegible]”[illegible]

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[illegible]AOL[illegible]BAT[illegible]360[illegible]

[illegible]“[illegible]”—[illegible]Facebook[illegible]Instagram [1][illegible]WhatsApp—[illegible]“[illegible]”[illegible]

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图 3-8

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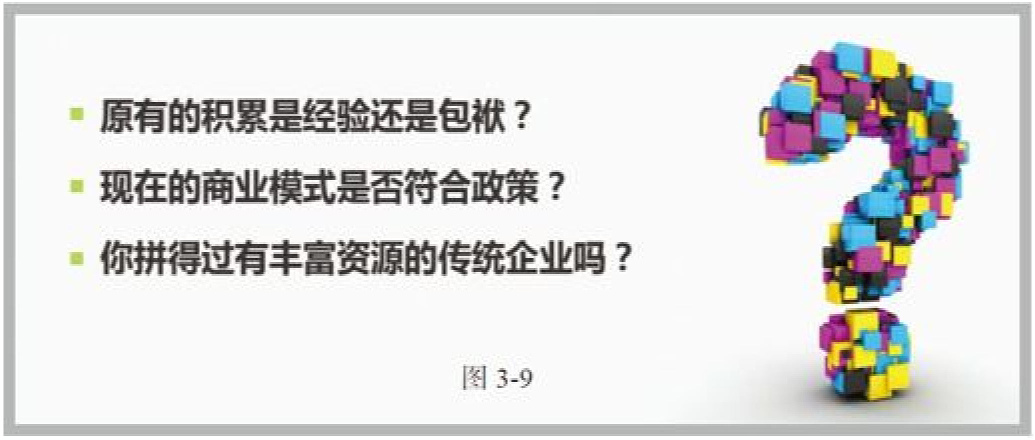


图 3-9

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[illegible]iPhone[illegible]“[illegible]”[illegible]“[illegible]”[illegible]“[illegible]”[illegible]



图 3-10

[illegible]3-10[illegible]



图 3-11

[illegible]

[illegible]CPS[illegible]Cost Per Sales[illegible]CPA[illegible]Cost Per Action[illegible]

[illegible]“[illegible]”[illegible]4S[illegible]

[illegible]O2O[illegible]

[illegible]“[illegible]”[illegible]

[illegible]

[illegible]

[illegible]

[illegible]“[illegible]”[illegible]

[illegible]

[illegible]

[illegible]

[illegible]What[illegible]Why[illegible]

[illegible]Linkedin[illegible]Flickr[illegible]“[illegible]”[illegible]Confinity[illegible]PayPal[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]